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MARKET STUDY ON THE AUTOMOTIVE INDUSTRY IN BRAZIL

This market guide booklet has been prepared with the problems inherent to the initiating exporter in mind. However it is not exhaustive; individual circumstances, interest and needs will dictate how companies should tailor their approach and strategy to the Brazilian market. While every attempt has been made to ensure accuracy in this study, no responsibility can be accepted for errors or omissions.

Further assistance can be obtained by addressing requests directly to the Commercial Division of the Canadian Consulate General in Sao Paulo, Brazil located at Edificio Top Centre, Avenida Paulista 584, 5 Andar*, 01210 Sao Paulo SP, Federative Republic of Brazil. Telephone: 287-2122, Telex: 23230 and Fax (sending from Canada): 011-(55) 5251-5057; or the South America and Mexico Trade Division, External Affairs and International Trade Canada, 125 Sussex Drive, Ottawa, Ontario K1A 0G2, Phone: (613) 996-4199; Fax: (613) 996-0677.

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THE AUTOMOTIVE INDUSTRY IN BRAZIL:

AN ANALYSIS OF ITS STRUCTURE AND THE POTENTIAL OPPORTUNITIES FOR CANADIAN EXPORTERS IN THE CONTEXT OF THE NEW IMPORT LIBERALIZATION POLICY

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1 OBJECTIVES

The Brazilian automotive market has been closed for international competition since the late 1960's. Therefore, although the Canadian industry has much to offer, mainly in auto parts supply, only few exports were made to the Brazilian market.
Brazil is in the process of implementing deep changes in its economic and trade policy. Internationalization and competition are the new guidelines.

In this context, it is important for potential Canadian suppliers to become acquainted with the structure of the local industry and market, in order to benefit from the potential business opportunities.

This report aims at providing an overview on the local market and, far more important, provide relevant information which could be used by the Canadian automotive industry in developing a strategy for the Brazilian market.

2 METHODOLOGY

This market study was developed through personal interviews with senior officers of the largest vehicle manufacturers, auto parts industries, business associations and Federal government

agencies. Articles published in the local specialized press by qualified market analysts were also utilized as a reference material.

An analytical and comparative study was developed based on the information gathered through the above sources in order to obtain a well-balanced perspective of the automotive sector.

3 BACKGROUND - INDUSTRY STRUCTURE AND DEVELOPMENT.

The development of an important automotive industry in Brazil was one of the main objectives of the aggressive industrialization and import substitution policies implemented by the Federal Government of Brazil in late 1950's. Substantial incentives were given to many multinational companies to establish manufacturing facilities in Brazil. Self-sufficiency and market protection, two principles that were present in virtually all industrial development programs in Brazil, served also as guidelines and incentives for the automotive industry. After the consolidation of the local industry, including the auto parts manufacturing sub-sector, imports were prohibited for all vehicles, exception being made to heavy off-highway vehicles and agriculture tractors which were not available from local sources.

As of 1980, the automotive industry became very important as a generator of Brazilian manufactured goods for exports. The BEFIEX

program, which was established in 1979, provided for a drawback (tax free) allowance for importation of machinery, parts and raw materials, based on formal commitments to increase export performance. This overall "protection scheme" created a solid oligopoly, which exercised its power to the fullest.

Further to promoting the industry's development and consolidation, the government also interfered in the industry by regularly setting price controls and imposing high Federal taxes for domestic sales (total taxes amount to approximately 60% of the ex-factory price). Additionally, the so-called "Law of Informatics" which precluded companies from importing computer-based products, had an impact in the level of sophistication of the vehicles locally manufactured vis-à-vis those manufactured in other countries. The following data provides a broad view of the industry's structure and development.

4 TABLE I - MANUFACTURERS WITH LOCAL PLANTS

MULTINATIONAL	VEHICLES PRODUCED
Volkswagen	Cars and trucks
Mercedes Benz	Trucks and buses
Volvo	Trucks and buses
Saab-Scania	Trucks and buses
Fiat	Cars
General Motors	Cars and trucks
Ford	Cars, trucks and tractors
Caterpillar	Off-highway vehicles
Valmet	Tractors
Toyota	Jeeps
J.I. Case	Tractors and off-highway vehicles

BRAZILIAN	VEHICLES PRODUCED
Gurgel	Cars
Engesa	Jeeps and tractors
Agrale	Light trucks and agricultural implements
Maxion (formerly Massey Ferguson)	Agricultural implements and tractors
CBT	Tractors

5 TABLE II - FOREIGN INVESTMENT AND REINVESTMENTS (US$ THOUSANDS)

YEAR	INVESTMENTS	REINVESTMENT	TOTAL
1980	1,097,687	455,084	1,552,771
1981	1,419,432	531,571	1,951,003
1982	1,680,845	560,997	2,241,842
1983	1,758,979	537,681	2,296,660
1984	1,795,856	552,345	2,348,201
1985	1,802,236	558,120	2,360,356
1986	1,802,394	558,706	2,361,100
1987	1,855,128	574,456	2,429,584
1988	1,870,185	598,156	2,468,341

NOTE: Includes investments in machinery and equipment. Does not include tractors.

Source (1): ANFAVEA (*)
(2): Central Bank

(*) Association of the Brazilian vehicles manufacturers

6 TABLE III - TOTAL SALES - IN THOUSAND UNITS

YEAR	DOMESTIC		EXPORT		TOTAL	
	V	T	V	T	V	T
1980	980.3	61.0	157.1	8.5	1,137.4	69.5
1981	580.7	35.2	212.7	10.6	793.4	45.8
1982	691.3	31.3	173.4	6.6	864.7	37.9
1983	727.7	26.4	168.7	2.2	896.4	28.6
1984	677.1	45.7	196.5	3.7	873.6	49.4
1985	763.2	46.0	207.6	3.8	970.8	49.8
1986	866.9	55.2	183.3	6.1	1,050.2	61.3
1987	580.1	45.4	345.4	7.9	925.5	53.3
1988	747.7	33.8	320.5	10.5	1,068.2	44.3
1989(*)	770.0	34.0	260.0	8.0	1,030.0	42.0

(*) Preliminary data (Source: ANFAVEA)

V = Vehicles
T = Tractors

7 TABLE IV - YEARLY PROFIT AND DIVIDEND REMITTANCES - 1980/88 (US$ THOUSANDS)

YEAR	VEHICLES	TRACTORS	PARTS	TOTAL
1980	20,447	1,384	13,047	34,878
1981	31,577	13,312	18,070	62,959
1982	6,318	124	17,344	23,786
1983	2,836	2,511	20,428	25,775
1984	33,000	1,708	38,515	73,223
1985	35,132	1,753	31,008	67,893
1986	32,047	577	21,066	53,690
1987	85,220	5,430	15,997	106,647
1988	118,903	54,605	35,092	208,600

Source: ANFAVEA.

8 TABLE V - TRADE BALANCE OF THE AUTOMOTIVE INDUSTRY- 1980/1988 (US$ MILLIONS)

YEAR	VEHICLES		TRACTORS		TOTAL
	IMP	EXP	IMP	EXP	BALANCE
1980	524	1,101	72	120	624
1981	468	1,566	71	428	1,454
1982	318	1,154	81	290	1,045
1983	367	1,187	74	303	1,047
1984	394	1,433	93	317	1,263
1985	435	1,603	96	269	1,340
1986	656	1,487	158	195	867
1987	826	2,453	173	303	1,756
1988	695	2,617	194	573	2,301

NOTES:

1) Includes vehicles, tractors, parts and components exported by ANFAVEA members. The tractors data has been revised since 1976.

2) Imports of vehicles are primarily off-highway, mining and military.

Source: ANFAVEA.

9 MARKET CONTEXT

On March 15, 1990, President Fernando Collor announced the most radical economic stabilization program ever imposed in a Latin American country. It is certainly Brazil's most serious attempt to straighten out its economy and get the country back on the path of self-sustained growth. The priorities are focussing on modernizing the economy and reintegrating Brazil in the world market. President Collor is attempting to pursue an open market policy calling for a major reduction in trade barriers, floating exchange rate and elimination of subsidies/fiscal incentives.

The implementation phase of this plan, through its tough fiscal and monetary policies could result in a recession throughout 1991, which will imply little, if any, growth of imports. However, in developing an evaluation of market potential, the following assumptions should be considered:

- TRADE LIBERALIZATION - Brazil has become an open market which means that direct competition with foreign suppliers is already in place. Therefore, even when considering a recession scenario for the coming years, part of the auto-parts currently being purchased in the domestic market could be imported from foreign sources.

- REDUCTION OF DUTIES - Currently, the import duties are still high. Vehicles are subject to an import duty of 85% plus additional charges amounting to approximately 34% . Auto-parts are subject to import duties between 35% to 65% plus 34% of

additional charges. However, the government has announced that a gradual reduction of import tariffs will be implemented, aiming at bringing it to a more reasonable level by 1994.

- PRODUCTIVITY AND QUALITY OF LOCAL AUTO-PARTS INDUSTRIES

Although some local manufacturers enjoy an international reputation for their quality and productivity levels, most part of the industry still needs much improvement. The long period in which local industry was "protected" against foreign competition has kept it somewhat behind the technological advancements reached by the developed world. This has resulted in demand for better products at more competitive prices, which in itself is an indication of market potential for foreign suppliers.

- REGIONALIZATION

The Presidents of Brazil, Argentina and Uruguay have decided to develop feasibility studies to create a commom market in the southern cone. Although some trade facilitation practises have been in effect for many years, it is intended that the principles of free trade and investment be more thoroughly implemented.

The estimated impact in the automotive sector is directly related to potential joint-ventures or transfer of technology operations. Associations with local companies for manufacturing purposes will benefit from an even larger market potential, lcovering all the southern cone countries.

10 THE MARKET FOR VEHICLES

It is a common assumption in the local marketplace that, in the foreseable future, no substantial sales increase will take place. An important argument is the size of the local market. Sales in 1989 reached approximately the same level than in 1980. Between 1981 and 1985 sales were below one million units. According to a market study made by FENABRAVE (Brazilian Federation of Vehicles Distribution Companies), in 1980 there was 6.9 vehicles per one thousand inhabitants. This rate of sales has now been reduced to only 3.9 thousand.

The income distribution structure in Brazil prevents any short to medium-term expectation on the possibility of significant expansion of sales volume. The lowest priced car in Brazil is currently sold for approximately US$ 8,830.00. Although Brazil has a population of 150 million people, seventy percent of the families live on the equivalent of three minimum wages (approximately $280.00/month).

The above considerations should be taken into account by the potential investors, which would need an estimated US$ 2 billion to set up a full-scale automobile manufacturing plant in Brazil.

Market analysts believe that vehicle imports will be basically concentrated in high-priced sophisticated models or bottom-priced models for the typical middle-class buyer. In principle, it is

expected that the already established companies like Volkswagen, General Motors and Fiat will benefit the most, since they offer a well-structured nationwide distribution and service network.

Below is a list of some international manufacturers which have shown interest in exporting to Brazil. This information can be useful for Canadian auto parts manufacturers which already produce parts for these given vehicles:

Company	Vehicle	Type of operation
Lada (USSR)	Samara and Niva	(1)
BMW	300 Series	(1) and (2)
Peugeot	405 and 505	(1)
Fiat	Alfa Romeo 164	(1)
Ford	Lincoln and Thunderbird	(1)
Volkswagen	Audi V-8 and Scirocco	(1)

(1) Import of assembled vehicles.

(2) Local partial assembly.

General Motors have not yet defined which models will be imported. However, they will be sophisticated ones. Japanese manufacturers Mitsubishi, Nissan, Mazda and Suzuki and French Renault have been in Brazil to undertake market studies but no decision has been announced on investment plans. Honda and Toyota have small scale operations in Brazil and are in a better position to eventually introduce their product line.

11 THE AUTO PARTS SUB-SECTOR

The Brazilian auto parts industry began its activities in the early sixties as a consequence of the growth of the local automobile industry.

Auto parts manufacturers in Brazil are usually small or medium-sized companies, seventy percent of which are owned by Brazilians. These companies account for approximately fifty percent of the sub-sector consolidated revenue. There are 1,500 auto parts companies but the first 550 account for approximately 90% of the production.

Brazilian auto parts are considered to be priced well above the international levels by the local vehicles manufacturing companies, although labour costs are marginal; the tax structure (approximately 40%), the high financial costs resulting from the past few years high inflation rate and difficult access to more advanced and productive automated equipment (because of the protectionist market reserve policy) are the main factors contributing to the high costs.

Some local industries, however, have reached a level of technological sophistication comparable to North American and European manufacturers. This is mainly due to an aggressive

research and development policy. Accordingly, they have been able to export a considerable percentage of their production and benefit from the special incentives provided by the Brazilian government (drawback). It is important to note that these exports were not only to supply spare parts for Brazilian exports of vehicles but also to supply specific components for auto makers in the USA, such as Chrysler, Ford and General Motors besides Fiat in Italy.

The following tables contain quantitative information on the local market:

12 TABLE VI - AUTO PARTS MANUFACTURING (US$ MILLIONS)

YEAR	INVESTMENT	TOTAL REVENUE	EXPORTS
1980	284.0	5,287.0	732.5
1981	226.4	4,351.0	825.2
1982	270.8	4,986.0	658.7
1983	189.4	3,758.0	799.4
1984	231.7	4,819.0	1,264.9
1985	254.3	5,541.0	1,396.6
1986	429.5	6,637.0	1,401.7
1987	440.0	8,338.0	1,679.0
1988	627.8	10,642.0	2,081.0
1989(*)	700.0	13,900.0	2,400.0

(*) Preliminary.

13 TABLE VII - BRAZILIAN CIRCULATING FLEET (1,000 UNITS)

	1984	1985
Cars	9,198.5	9,527.3
Light commercials	861.4	905.2
Trucks	959.7	979.1
Buses	129.9	130.7
Others	334.1	395.0
Total	11,483.6	11,937.3

	1986	1987	1988	(*) 1989
Total	12,550.0	12,865.0	13,300,0	13,800.0

(*) Preliminary data.

Sources - 1984 and 1985 - GEIPOT (Federal Government's Transportation Planning Group)
- 1986 to 1989 - SINDIPECAS (Brazilian Auto Parts Manufacturers Association)

Senior officials of the largest auto makers in Brazil have expressed their concern over the high-price of the Brazilian-made auto parts. According to these sources, quality has met the expectations but prices have been above average international levels.

The industry is in a situation of oligopoly. Furthermore, the existing tax structure, as explained above, contributes to increase the price. In this regard, it is interesting to note that the Brazilian auto parts manufacturers which have been successful in selling parts to auto makers in USA and Europe, have done it because of the virtual elimination of all domestic taxes.

14 BASIC ELEMENTS TO BE CONSIDERED IN THE DEVELOPMENT OF A MARKET STRATEGY BY CANADIAN COMPANIES

A) AUTO PARTS - TAXATION SCHEME

The Federal government's economic policy makers, considering the price impact of the automotive industry on the economy as a whole, have decided to subject the auto parts industry to a more direct level of international competition. For that matter the government of Brazil has put the existing import duties under revision and it is expected that the government will shortly announce shortly a substantial reduction of duties for a group of selected auto parts which are now enjoying a monopolistic situation.

This scenario clearly indicates that it is an excellent moment for international suppliers to position themselves in the local market. We have been informed by the officials interviewed that the procurement divisions of the vehicle manufacturing companies have started to identify potential foreign sources of supply, in order to optimize their purchasing operations.

It is important to distinguish the two distribution channels of the automotive parts industry so that an appropriate preliminary strategic approach be developed by potential Canadian exporters.

B) OEM - ORIGINAL EQUIPMENT MANUFACTURER

The introduction of original equipment is usually a result of a joint technical development between the auto parts supplier and the vehicle manufacturer. Parts are also supplied through specifications developed by the automobile manufacturers.

Therefore, it is recommended that interested suppliers approach directly the procurement divisions of the vehicles manufacturing companies in order to initiate discussions on technical specifications, production availability and prices.

C) AFM - AFTER-MARKET SALES

Part of the products distributed through the services and auto parts distribution network is of very specific nature and, therefore, are usually certified by the automobile manufacturer (OEM). Even if not OEM, they follow closely the standard technical specifications. In other words, distribution of referred parts is a natural consequence of OEM certification. Vehicles manufacturers usually take part in the distribution of these parts through their authorized dealers network.

In order for Canadian companies to develop business contacts with potential customers in Brazil a detailed list of contacts in the vehicles manufacturing and distribution/services network has been developed by the post. Please refer to next chapter, "List of the key commercial contacts in the local market".

D) JOINT VENTURE AND TRANSFER OF TECHNOLOGY

In the overall Brazilian automotive market evaluation, some focus should be directed towards possible joint ventures and projects based on transfer of technology.

INPI - Brazilian Institute of Intelectual Property has received the mandate to develop new rules that adequately reflect the opening of the Brazilian economy. INPI is focussing on a new structure that will reduce existing bureaucracy and facilitate agreements.

An implicit factor of the new economic and business philosophy under implementation in Brazil is the search for efficiency and increased productivity. As explained above, although there are auto parts manufacturers which have state-of-the-art technology and production methods, there are many companies which are in need of technology inflow in order to maintain their market share.

These factors which have limited the expansion of the Brazilian automotive industry could prevent any short-term action on direct investment. This is a conclusion shared by most contacts in the industry. However, transfer of technology as a means of market penetration should be viewed as an interesting opportunity and a first step towards eventual future investment. The stagnation of the domestic market's demand in the last 10 years should be balanced with the positive trade balance of the industry, i.e. the aggressive Brazilian international marketing.

E) ENVIRONMENT PROTECTION

Environment protection has been object of major concern by the new federal administration. It is a fact widely recognized that Brazilian vehicles are highly polluting. The government has determined that as of 1993, the automotive industry should be prepared to comply strictly with pollution control standards similar to those in effect in the developed countries.
Accordingly, it is expected that there will be a growing demand for pollution control devices and technology.

RECOMMENDATION:

Post recommends that Canadian companies interested in pursuing opportunities in the Brazilian market, establish direct contacts with potential importers as per attached list and keep the Consulate informed on the ongoing communications with local companies.

S A A B-S C A N I A - DEALERS

1 SR. NILTON FUKUSHIMA
MANAGER (AUTO PARTS)
CODEMA COML. E IMPORTACAO LTDA.
ROD. PRES. DUTRA KM 228
07000 GUARULHOS, SP
TEL.: (011) 940-2422
FAX.: (011) 208-7366

2 SR. SAUL CORCH
MANAGER
AV. PRES. KENNEDY 2559
06000 OSASCO, SP
TEL.: (011) 701-9900
FAX.: (011) 701-9555

3 SR. MANOEL ANTONIO DOMINGUES
MANAGER
CODEMA COML. E IMPORTACAO LTDA.
PRACA GAUCHA 81
04247 SAO PAULO, SP
TEL.: (011) 215-0562
FAX.: (011) 272-7155

4 SR. CLAUDIO BORGHESI
MANAGER
SUPERCAR COM. IMP. DE VEICULOS LTDA.
AV. DOS ESTADOS 2257
09000 SANTO ANDRE, SP
TEL.: (011) 447-2755
TLX.: 11-46007

5 SR. CARLOS LUIZ DE SOUZA
MANAGER (PARTS)
TRANSCAR COM. DE VEIC. LTDA.
ROD. MAL. RONDON KM 336
17100 BAURU, SP
TEL.: (0142) 23-2944
FAX.: (0142) 34-7152
TLX.: 142358

15 LIST OF THE KEY COMMERCIAL CONTACTS IN THE LOCAL MARKET

AUTO AND TRUCK MANUFACTURERS

1 AUTOLATINA S.A. (JOINT VENTURE OF VOLKSWAGEN AND FORD)

SR. LUIZ MARANGON (SCY ARLETE)
IMPORT MANAGER
VIA ANCHIETA KM 23,5
09899 SAO BERNARDO DO CAMPO, SP
TEL.: (011) 753-2481/753-2458
FAX.: (011) 443-1288
TLX.: 11-44072

2 FIAT DO BRASIL S.A.

SR. ALBERTO MAYER (SCY FRANCESCA)
FINANCIAL MANAGER (ALSO IMPORT)
AV. PAULISTA 407 - 7o. ANDAR
01311 SAO PAULO, SP
TEL.: (011) 289-9111
FAX.: (011) 289-9111, EXT. 2064
TLX.: 11-31307

3 GENERAL MOTORS DO BRASIL S.A.

SR. JORGE CHAP CHAP (SCY VANIA)
IMPORT MANAGER
AV. GOIAS 1805
09950 SAO CAETANO DO SUL, SP
TEL.: (011) 442-7700
FAX.: (011) 442-8575
TLX.: 11-44137

4 GURGEL AUTOMOVEIS S.A.

SR. WILSON ROBERTO MUCCILLO
IMPORT MANAGER
ROD. WASHINGTON LUIS KM 171
13500 RIO CLARO, SP
TEL.: (0195) 34-9588
FAX.: (0195) 34-8678
TLX.: 191419

5 SAAB-SCANIA DO BRASIL S.A.

SR. ROBERTO MECCHI (SCY MONICA)
IMPORT MANAGER
AV. JOSE ODORIZZI 151 VILA EURO
09810 SAO BERNARDO DO CAMPO, SP
TEL.: (011) 752-9151
FAX.: (011) 451-3625
TLX.: 11-45251

6 ENGESA S.A.

SR. JOSE FRANCISCO DE SA RIBEIRO
COMMERCIAL DIRECTOR
AV. TUCUNARE 125 TAMBORE
06400 BARUERI, SP
TEL.: (011) 421-4711
FAX.: (011) 421-4445
TLX.: 11-71302

7 AGRALE S.A.

SR. LISENO A. BRAUN
IMPORT MANAGER
BR 116, KM 145, NR. 15104 SAO CIRO
95050 CAXIAS DO SUL, RS
TEL.: (054) 222-1133
FAX.: (054) 222-1290
TLX.: 542177/542428

8 VOLVO DO BRASIL, MOTORES E VEICULOS S.A.

SR. LUIZ ANTONIO DE SOUZA NETO
IMPORT MANAGER
AV. JUSCELINO KUBITSCHEK DE OLIVEIRA 2600
CIDADE INDUSTRIAL
81000 CURITIBA, PR
CP 7981
TEL.: (041) 271-8111
FAX.: (041) 272-1081
TLX.: 415638

9 MERCEDES-BENZ DO BRASIL S.A.

SR. VLAUDIMIR MULLER
IMPORT MANAGER
AV. ALFRED JURZYKOWSKI 562
09880 SAO BERNARDO DO CAMPO, SP
TEL.: (011) 455-7260/455-7436
FAX.: (011) 455-7667
TLX.: 44157

F I A T - DEALERS

1 SR. WALTER FACCHINI
MANAGER
GENOVA DISTRIBUIDORA DE VEICULOS LTDA.
AV. INTERLAGOS 1550
04660 SAO PAULO, SP
TEL.: (011) 524-3003
FAX.: (011) 521-5362

2 SR. BENEDITO COSTA FILHO
MANAGER
METROPOLITANA DISTRIBUIDORA DE VEICULOS E PECAS LTDA.
RUA GAL. OLIMPIO DA SILVEIRA 160
01150 SAO PAULO, SP
TEL.: (011) 825-2033
FAX.: (011) 825-2073

3 SR. WANDERLEY BATALHINI
MANAGER
TIRRENO VEICULOS LTDA.
AV. GAL. ATALIBA LEONEL 1716
02033 SAO PAULO, SP
TEL.: (011) 299-7299
FAX.: (011) 290-9023

4 SR. DIRCEU PERCIVAL P. MACHADO
MANAGER (AUTO PARTS)
MIRAFIORI S.A. DISTRIBUIDORA DE VEICULOS
AV. SANTO AMARO 400
04506 SAO PAULO, SP
TEL.: (011) 820-3236
FAX.: (011) 820-3972
TLX.: 11-25868

5 SR. NELSON SAMPAIO
MANAGER
SINAL DISTRIBUIDORA DE VEICULOS LTDA.
RUA TOBIAS BARRETO 735
03176 SAO PAULO, SP
TEL.: (011) 264-0129
TLX.: 11-62645

M E R C E D E S-B E N Z - DEALERS

1 SR. ANTONIO PADUA ARANTES
DIRECTOR
GUANABARA DIESEL S.A.
AV. BRASIL 8255 RAMOS
21030 RIO DE JANEIRO, RJ
TEL.: (021) 270-3662
FAX.: (021) 260-4099
TLX.: 21-32788

2 SR. WILSON URBANO FILHO
PRESIDENT
COMVEIMA - COM. DE VEICULOS MAQ. E TRATORES LTDA.
AV. PRESIDENTE DUTRA 3150 CP 37
45100 VITORIA DA CONQUISTA, BA
TEL.: (073) 421-1610
FAX.: (073) 422-5131
TLX.: 722603

3 SR. LUIZ ARAUJO DE SOUZA
COMMERCIAL DIRECTOR
RIO DIESEL VEICULOS E PECAS S.A.
AV. CARLOS MARQUES ROLLO 881 CP 77191
26225 NOVA IGUACU, RJ
TEL.: (021) 796-0110
FAX.: (021) 796-4848
TLX.: 21-38864

4 SR. LUIZ ARY RADUNZ
DIRECTOR
CIVEMA - COM. DE VEICULOS MARUMBI
ROD. BR 116, KM 107 PINHEIRINHO
CP 1891
81500 CURITIBA, PR
TEL.: (041) 246-6622
FAX.: (041) 246-1075
TLX.: 416177

5 SR. ACASSIO MASSON FILHO
COMMERCIAL DIRECTOR
URBANO VEICULOS LTDA.
AV. FABIO EDO. RAMOS ESQUIVEL 455
09920 DIADEMA, SP
TEL.: (011) 445-3300
FAX.: (011) 456-1256
TLX.: 11-44421

V O L K S W A G E N - DEALERS

1 SR. JOSE DOMINGOS DELCIELLO
COMMERCIAL DIRECTOR
CIBRAMAR
RUA JOAQUIM FLORIANO 503
04534 SAO PAULO, SP
TEL.: (011) 820-2533/820-0025
TLX.: 11-25557
FAX.: (011) 829-0713

2 SR. LUIZ FERNANDO PAIVA PRAZ
COMMERCIAL DIRECTOR
PANAMBRA SUL RIOGRANDENSE S.A.
RUA ANDRADE NEVES 4130
96015 PELOTAS, RS
TEL.: (0532) 23-0935
TLX.: 053240

3 SR. ANESIO GASPERONE
COMMERCIAL DIRECTOR
SOPAVE
AV. NAZARE 1060
04262 SAO PAULO, SP
TEL.: (011) 273-8522/274-3624
FAX.: (011) 914-6517
TLX.: 11-22397

4 SR. CARLOS HUMBERTO NASCIMENTO
COMMERCIAL DIRECTOR
DISTRIBUIDORA SUDOESTE LTDA.
RUA ABEL PEREIRA DE CASTRO 985
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